

# Development and Feedback

## Development and Feedback (Genesys Cloud Performance and Engagement)

Section	Description
Feature Area	Performance and Engagement
Admin Location	Admin → Performance and Engagement → Development and Feedback
Primary Function	Create, assign, and manage <b>training and assessment modules</b> for agents and employees
Training Sources	<b>Genesys Beyond</b> content or custom organization-created modules
Module Types	<b>Learning, Learning with Assessment, Assessment</b>
Typical Users	Supervisors, Quality Administrators, Performance Managers, WEM Administrators
Key Dependency	Performance Management / WEM capabilities must be enabled for the organization :contentReference[oaicite:0]{index=0}

Development and Feedback provides the training layer of Genesys Cloud performance management. It allows administrators and supervisors to assign prepackaged or custom learning content to help bridge knowledge gaps, reinforce coaching plans, and support continuous agent improvement. The module supports both educational content and scored knowledge checks, and it can automatically assign modules based on organizational criteria such as ACD skills, divisions, or groups. :contentReference[oaicite:1]{index=1}

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# Summary Table

Attribute	Details
Feature Type	Performance Management / Learning Management
Core Purpose	Deliver development modules and assessments to employees
Assignment Model	Manual assignment and auto assignment
Content Types	Files, documents, learning content, assessments
Scoring Support	Available when module includes assessment/question groups
Automation Inputs	ACD skills, divisions, groups
Transcript Source Coverage	Module types, assignment model, basic create flow
Documentation Coverage	Performance management and WEM positioning of development modules :contentReference[oaicite:2]{index=2}

# Study Notes

Topic	Explanation
Development Modules	Structured learning content assigned to users
Feedback	Used to guide improvement and address knowledge gaps
Genesys Beyond	Genesys-provided training content that can be assigned
Custom Modules	Organization-built learning modules
Module Type	Determines whether the module is educational only or includes an assessment
Auto Assign	Automatically assigns modules to users based on matching criteria
Assessment Content	Question groups and questions similar to evaluation forms
Recommended Completion Date	Target completion date set by the administrator

Development and Feedback is part of Genesys Cloud performance management and is intended to improve agent performance through guided learning, evaluation follow-up, and targeted knowledge reinforcement. Agents can access assigned training modules as part of their performance experience. :contentReference[oaicite:3]{index=3}

# Transcript Implementation Notes

Source: Transcript

The instructor describes Development and Feedback as part of **Performance and Engagement** and explains that administrators can assign **Genesys Beyond** training or create their own modules.

Step	Instruction
Step 1	Go to <b>Performance and Engagement</b> → <b>Development and Feedback</b>
Step 2	Choose to assign <b>Genesys Beyond</b> training or create a custom module
Step 3	Select the module type: <b>Learning</b> , <b>Learning with Assessment</b> , or <b>Assessment</b>
Step 4	Enter a <b>name</b> and <b>description</b>
Step 5	Set a <b>recommended completion date</b>
Step 6	Add <b>content</b> such as files or documents
Step 7	Add <b>question groups</b> and <b>questions</b> if assessment content is required
Step 8	Configure <b>Auto Assign</b> rules based on <b>ACD skills</b> , <b>divisions</b> , or <b>groups</b>
Step 9	Save and assign the module

Transcript-derived implementation guidance:

Item	Guidance
Module Type Selection	Choose <b>Learning</b> when no assessment is needed, <b>Learning with Assessment</b> when content and scoring are both needed, and <b>Assessment</b> when the goal is testing only
Content Strategy	Attach documents or files that directly support the coaching objective
Assessment Design	Build question groups similar to evaluation forms for consistency

Item	Guidance
Targeting Strategy	Use Auto Assign to align modules with teams, skills, or organizational segmentation
Character Limits	Not explicitly documented in the transcript
Required Fields	Name and module type are clearly implied by the create flow; other required-field behavior is not explicitly documented in Genesys UI documentation

# Navigation

Task	Navigation Path
Open Development and Feedback	Admin → Performance and Engagement → Development and Feedback
View modules	Admin → Performance and Engagement → Development and Feedback
Create module	Admin → Performance and Engagement → Development and Feedback → Create
Edit module	Admin → Performance and Engagement → Development and Feedback → Edit
Assign module	Admin → Performance and Engagement → Development and Feedback → Assign
Configure auto assignment	Admin → Performance and Engagement → Development and Feedback → Auto Assign
Review assigned training as agent	Agent performance area / assigned modules view (exact UI path not explicitly documented in Genesys UI documentation)

# Configuration Fields (UI Form Fields)

## Main Page

UI Field	Description	Options
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Module List	Displays existing development and feedback modules	Read-only
Module Name	Name of the module	Read-only in list
Module Type	Indicates module category	<b>Learning / Learning with Assessment / Assessment</b>
Description	Short explanation of module purpose	Read-only in list
Recommended Completion Date	Target completion date for assignees	Date
Assignment Status	Shows whether module is assigned/published/active	Not explicitly documented in Genesys UI documentation
Search	Search for modules	Text field
Filter	Filter modules list	Not explicitly documented in Genesys UI documentation
Create	Start a new module	Button
Edit	Modify selected module	Button
Delete	Remove selected module	Button
Assign	Assign module manually	Button
Refresh	Reload module list	Button

## Create/Edit Form

UI Field	Description	Options
Module Name	Unique module title	Text
Description	Explains the objective of the module	Text area
Module Type	Defines whether content includes assessment	<b>Learning / Learning with Assessment / Assessment</b>
Recommended Completion Date	Suggested completion target	Date picker
Content	Add learning content	Files / Documents
Question Group Name	Groups assessment questions	Text
Add Question	Create assessment item	Button
Question Type	Assessment question type	<b>Multiple Choice / Yes-No / Range</b> (transcript aligns these with evaluation-style questions)
Question Name	Name/title of question	Text
Help Text	Guidance shown with the question	Text

UI Field	Description	Options
Points	Score value	Numeric
Require Comments	Require additional comments	Toggle or option; not explicitly documented in this specific UI, but transcript states similar question behavior
Conditional Display	Show question conditionally	Not explicitly documented in Genesys UI documentation for this page; transcript says questions can be conditional in similar form behavior
Auto Assign	Opens or enables assignment rules	Button / section
Save	Save module	Button
Publish	Make module available	Not explicitly documented in Genesys UI documentation for this page; transcript does not explicitly confirm publish behavior for modules
Cancel	Cancel changes	Button

Character limits for **Module Name**, **Description**, and **Question Group Name** are **not explicitly documented in Genesys UI documentation**.

# Tabs, Toggles, Dropdowns, Action Buttons

Element Type	Items
Tabs	Content / Assessment / Auto Assign (exact tab names not explicitly documented in Genesys UI documentation; these are logical create areas derived from transcript workflow)
Dropdowns	Module Type / Question Type
Toggles	Auto Assign enabled state, Require Comments (specific toggle labels not explicitly documented in Genesys UI documentation)
Date Controls	Recommended Completion Date
Upload Controls	Add files / documents
Action Buttons	Create / Save / Cancel / Edit / Delete / Assign / Add Question / Auto Assign
Text Inputs	Module Name / Description / Question Group Name / Question Name / Help Text

# Dependencies

Component	Purpose
Performance Management	Base feature area for Development and Feedback :contentReference[oaicite:4]{index=4}
Workforce Engagement Management (WEM)	Broader feature family that includes development modules :contentReference[oaicite:5]{index=5}
Users and Permissions	Needed to assign modules and manage access
ACD Skills	Can be used for Auto Assign rules
Divisions	Can be used for Auto Assign rules
Groups	Can be used for Auto Assign rules
Documents / Files	Used as attached module content
Evaluation-style Question Logic	Assessment section follows question-group/question patterns similar to evaluation forms

# Platform Integration / Related Components

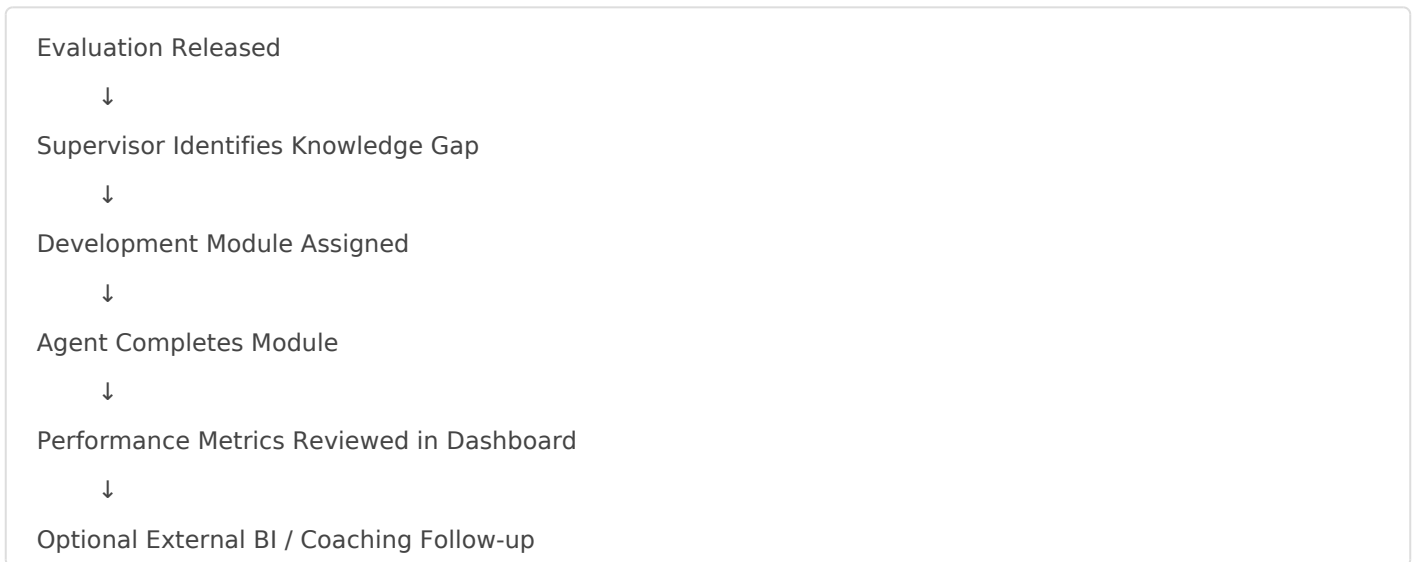
Component	Relationship
Genesys Beyond	Prepackaged training content source mentioned in transcript
Evaluations	Evaluation outcomes often drive coaching and targeted module assignment
Coaching	Modules can reinforce coaching plans and identified performance gaps
Scorecards	Training completion and performance improvement are related in agent performance management :contentReference[oaicite:6]{index=6}
Gamification	Another Performance and Engagement feature used alongside learning modules
Groups / Divisions / Skills	Organizational targeting dimensions for Auto Assign

Component	Relationship
Documents	Storage or selection of training materials
Reports, Views, and Dashboards	Used to monitor broader performance outcomes related to training effectiveness :contentReference[oaicite:7]{index=7}

# Integration Examples

Integration	Description
HR/LMS Export	Track completion outside Genesys Cloud using exported reports or manual reconciliation
Analytics / Performance Reporting	Correlate training assignments with performance results in reporting views
Notifications API	Can support downstream workflow when assignment/completion events are exposed through organizational integrations; not a UI field
API Usage / External BI	External dashboards can consume performance data for learning impact analysis, where available through supported reporting pipelines

Example integration workflow:



# Related Topics / Further Reading

Topic	Description
Performance Management	Parent feature area for modules and scorecards ([Genesys Cloud Resource Center][1])
Workforce Engagement Management	Suite that includes development modules, gamification, and quality tools ([Genesys Cloud Resource Center][1])
Evaluation Forms	Similar question-group and scoring model for assessments
Gamification	Performance engagement mechanism complementary to training
External Metrics Definitions	Scorecard enrichment with third-party metrics
Reports, Views, and Dashboards	Monitor performance changes after training assignments ([Genesys Cloud Resource Center][1])

# Implementation Checklist

Task	Status
Confirm Performance Management / WEM licensing and access	<input type="checkbox"/>
Review target audience for training	<input type="checkbox"/>
Decide whether to use Genesys Beyond or custom content	<input type="checkbox"/>
Choose module type	<input type="checkbox"/>
Prepare files/documents	<input type="checkbox"/>
Build assessment question groups if needed	<input type="checkbox"/>
Define recommended completion date	<input type="checkbox"/>
Configure Auto Assign rules	<input type="checkbox"/>
Validate assignment scope (skills/divisions/groups)	<input type="checkbox"/>
Test with pilot users	<input type="checkbox"/>

# Implementation Guide

Step	Action
Step 1	Navigate to <a href="#">Admin → Performance and Engagement → Development and Feedback</a>
Step 2	Click <b>Create</b>
Step 3	Enter <b>Module Name</b> and <b>Description</b>
Step 4	Select <b>Module Type</b> : Learning, Learning with Assessment, or Assessment
Step 5	Set <b>Recommended Completion Date</b>
Step 6	Add <b>files or documents</b> as content if applicable
Step 7	Add <b>question groups</b> and <b>questions</b> if assessment is required
Step 8	Configure <b>Auto Assign</b> rules using ACD skills, divisions, or groups
Step 9	Save the module
Step 10	Validate that the correct users receive the assignment

## How to Implement

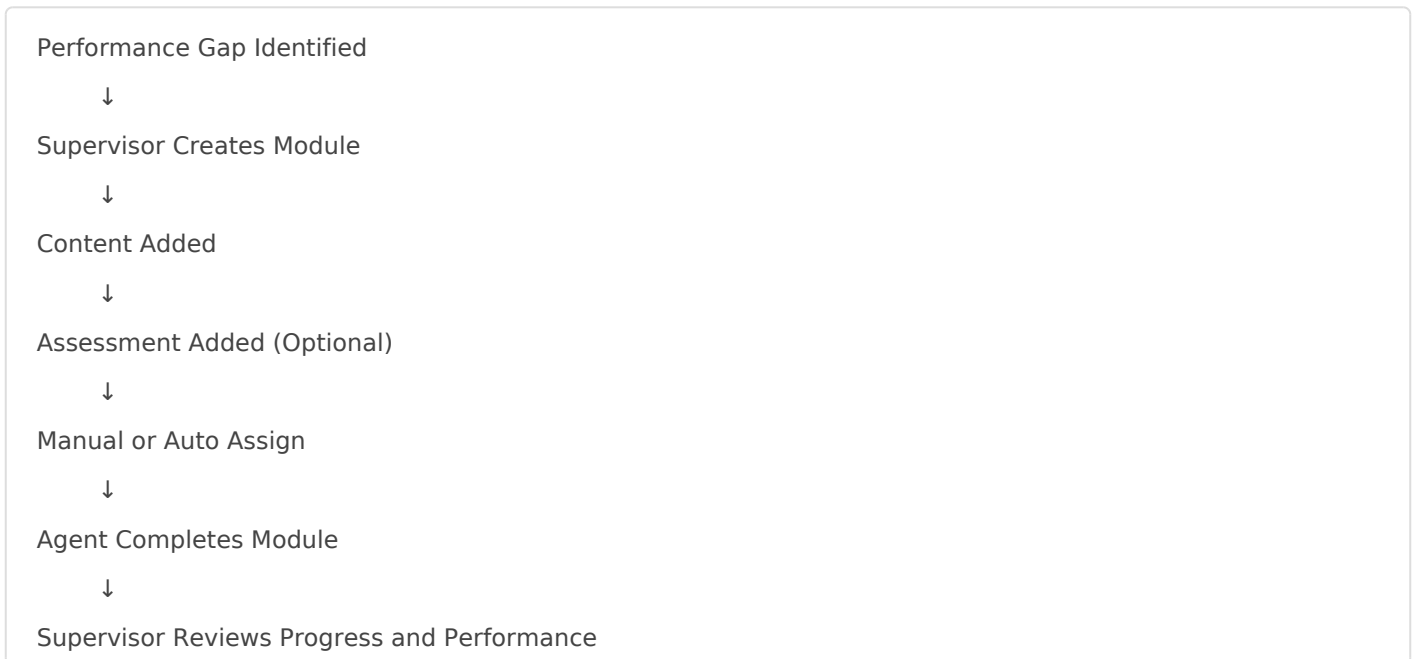
Phase	Description
Planning	Identify business gap, coaching objective, and target audience
Content Build	Prepare learning materials and assessment questions
Module Design	Choose the right module type and structure
Assignment Design	Decide manual assignment vs Auto Assign
Validation	Test with a pilot group
Rollout	Deploy to production user groups
Measurement	Review completion and post-training performance

Recommended selection model:

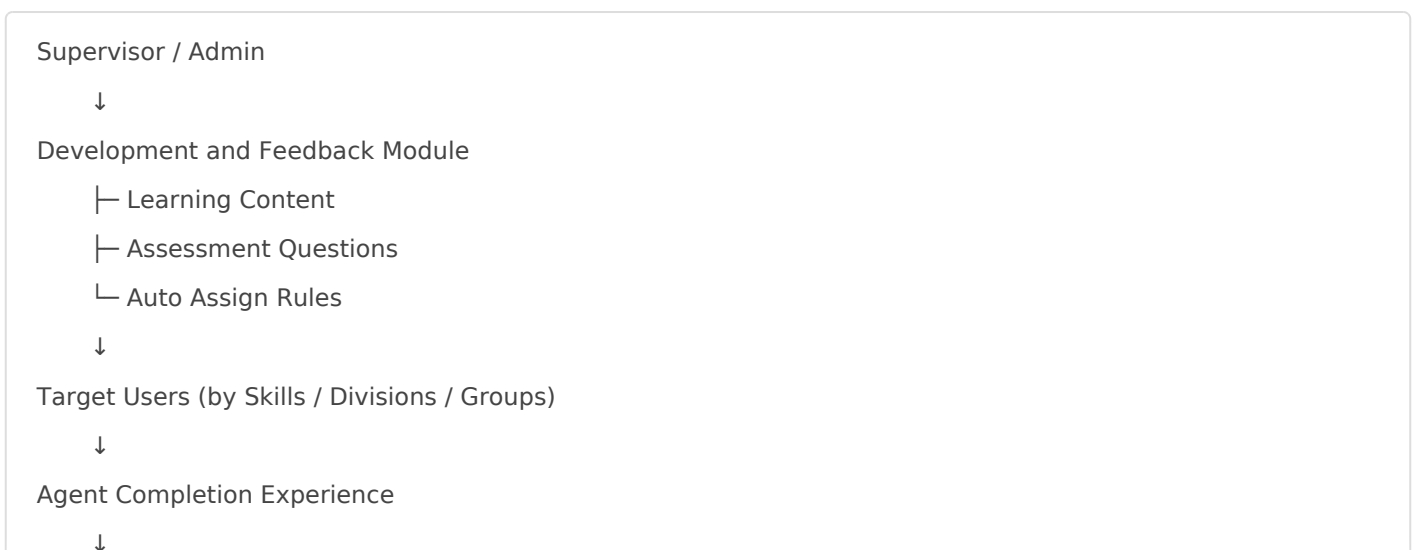
Need	Recommended Module Type
------	-------------------------

Knowledge transfer only	Learning
Knowledge transfer plus validation	Learning with Assessment
Knowledge check only	Assessment

# Workflow



# Architecture Diagram



# Real Flow Scenarios

## Scenario 1 – Evaluation-Driven Remediation

Agent receives low evaluation score on compliance



Supervisor creates "Compliance Refresher" module



Module type = Learning with Assessment



Assigned to impacted agents



Agents complete module and assessment



Future evaluations improve

## Scenario 2 – Onboarding by Skill Group

New ACD skill introduced



Admin creates product knowledge module



Auto Assign rule targets users with that ACD skill



Users receive module automatically



Completion tracked as part of onboarding

# Usage Scenarios

Scenario	Description
New hire onboarding	Deliver standard learning content to new agents
Post-evaluation coaching	Assign targeted remediation after poor evaluations
Product launch training	Deliver new knowledge to selected teams
Compliance refreshers	Reinforce required policies and scripts
Skill-based enablement	Auto assign modules by ACD skill
Division-specific training	Assign modules based on business unit or division

# Implementation Examples

Example	Configuration
Compliance Refresher	Learning with Assessment / assigned to regulated queue teams
Product Launch Training	Learning / assigned to sales division
Knowledge Validation Quiz	Assessment / assigned to support group
New Hire Fundamentals	Learning with Assessment / auto assigned to onboarding group

# Design Example

Module Name: Billing Policy Refresher

Type: Learning with Assessment

Content: PDF policy guide + quick reference sheet

Question Groups: Policy Rules / Escalation Handling

Auto Assign: Billing division + selected support groups

Completion Target: 7 days

# Best Practices

Practice	Reason
Match module type to objective	Prevent unnecessary complexity
Keep modules focused on one coaching goal	Improves completion and retention
Use clear, action-oriented titles	Makes assignment purpose obvious
Attach concise supporting documents	Reduces learner fatigue
Reuse evaluation-style scoring patterns	Creates consistency across quality and training
Pilot Auto Assign rules first	Avoids incorrect broad assignment
Align modules with coaching plans	Improves measurable performance outcomes
Review completion and performance together	Training value is proven by behavior change

Source: Operational Best Practice

# Naming Convention

Resource	Example
Learning Module	Billing_Policy_Refresher
Assessment Module	Security_Awareness_Assessment
Combined Module	New_Hire_Onboarding_Learning_Assessment
Question Group	Product_Knowledge
Auto Assign Rule	AutoAssign_Billing_Division_Compliance

Naming pattern:

<BusinessArea>\_<Topic>\_<ModuleType>

Examples:

Support\_LoginTroubleshooting\_Learning  
Compliance\_CallHandling\_Assessment  
Sales\_NewOffer\_LearningWithAssessment

# Security Considerations

Control	Description
Role-Based Access	Limit who can create, edit, assign, and delete modules
Content Governance	Ensure attached files/documents are approved and current
Division-Aware Assignment	Prevent users from receiving irrelevant or restricted training
Auditability	Maintain records of who created and assigned training
Privacy	Do not attach sensitive data unless properly governed
Least Privilege	Grant only required permissions for content management and assignment

# Limitations / Constraints

Constraint	Description
Character Limits	Not explicitly documented in Genesys UI documentation
Publish Behavior	Not explicitly documented in Genesys UI documentation for this specific feature page
Exact Filter Set on Main Page	Not explicitly documented in Genesys UI documentation
Auto Assign Logic Dimensions	Transcript explicitly mentions <b>ACD skills, divisions, groups</b>
Module Types	Limited in transcript to <b>Learning, Learning with Assessment, Assessment</b>
Assessment Question Model	Transcript states assessment questions are similar to evaluations
Dependency on Feature Availability	Performance Management / WEM access is required ([Genesys Cloud Resource Center][1])

# Troubleshooting

Issue	Cause	Resolution
Users did not receive module	Auto Assign criteria did not match	Verify ACD skills, divisions, or groups
Wrong users received module	Assignment criteria too broad	Refine Auto Assign scope and pilot first
Assessment incomplete	Required content or question groups missing	Review module structure
Low completion rate	Module too long or unclear	Simplify content and clarify objective
No measurable performance change	Module not aligned to root cause	Rework training to address actual gap
Attached document unavailable	File/content issue	Re-upload approved content and retest

# Interview Cheat Sheet

Question	Answer
What is Development and Feedback?	Genesys Cloud feature for assigning training and assessment modules
What module types are available?	Learning, Learning with Assessment, Assessment
What can be used as content?	Files or documents; Genesys Beyond can also be assigned
How can modules be assigned automatically?	By ACD skills, divisions, or groups
How is it related to performance management?	It supports coaching, development, and continuous improvement ([Genesys Cloud Resource Center][1])
Are APIs UI fields?	No; APIs belong under integration, not UI configuration

# Key Takeaways

Topic	Summary
Development and Feedback	Training and assessment capability within Performance and Engagement
Module Types	Learning, Learning with Assessment, and Assessment

Topic	Summary
Content Model	Files/documents plus optional question groups
Auto Assign	Targets users by ACD skills, divisions, or groups
Business Value	Reinforces coaching and closes performance gaps
Documentation Gaps	Some exact UI labels and field limits are not explicitly documented in Genesys UI documentation

# Screenshots

Module Name	Type	Assigned	Completed	Perc...	Aver...	Status	Auto Assi..	Date ..	Source	Action
Beyond: Best Practices - Customer Service Representatives	Learning	0	0	-	-	Publish...	Off	Jan 31, 20...	Genesys ...	⋮
Beyond: Introduction to Genesys Cloud CX for Agents - Analytics	Learning	0	0	-	-	Publish...	Off	Jan 31, 20...	Genesys ...	⋮
Beyond: Introduction to Genesys Cloud CX for Agents - Interactions	Learning	0	0	-	-	Publish...	Off	Jan 31, 20...	Genesys ...	⋮
Beyond: Introduction to Genesys Cloud CX for Agents - The Basics	Learning	0	0	-	-	Publish...	Off	Jan 31, 20...	Genesys ...	⋮
Beyond: Introduction to Genesys Cloud CX for Agents - Working Together	Learning	0	0	-	-	Publish...	Off	Jan 31, 20...	Genesys ...	⋮
Beyond: Introduction to Genesys Cloud CX for Supervisors - Advanced Management	Learning	0	0	-	-	Publish...	Off	Aug 11, 2...	Genesys ...	⋮
Beyond: Introduction to Genesys Cloud CX for	Learning	0	0	-	-	Publish...	Off	Aug 11, 2...	Genesys ...	⋮

Details

Content

Assessment

Auto Assign

**Name \***

Module Name

**Module Type**

Learning with Assessment

**Description**

Module Description

**Recommended Completion Date \***

30



days after assignment

Details

Content

Assessment

Auto Assign

### Recommended Time to Complete ⓘ

hours

minutes



This module has no "Recommended Time to Complete" associated to it.

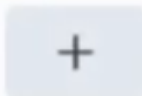
### Cover Image ⓘ

Select a cover image for this module.

Recommended minimum size for cover image is 1024 x 768.



Default Image



### Pass Mark % ⓘ

80%

Details

Content

Assessment

Auto Assign

Add Content

1 Enter URL or select media from Documents x



Documents

Search Documents

No Results

Did not find what you're looking for?  
Change your search and try again.

Details Content **Assessment** Auto Assign

ⓘ Should have at least one scorable question.

Group 1 of 1

**Question Group Name**

ⓘ This field is required.

0 Question(s), Total Points: 0

---

**Question Group Properties**

N/A Enabled Question Group

---

**Answers Default To**

Highest Scoring  N/A

Multiple Choice

Yes / No

Free Text

just contain at least one question.

Done

**Pass Mark % \***

Points 0

1

Points 0

0%

Details Content Assessment **Auto Assign**

**Auto Assign** ⓘ

On

Add Rule

Total added: 0

No agents added

Performance ▼

Report

**Workspace**

Overview (Evaluations)

Outbound Campaigns

Intraday Monitoring

Real-Time Adherence

Historical Adherence

Historical Shrinkage

Agent Develop... +										
Performance   Statuses   Evaluations   Insights   Leaderboards   <b>Development</b>   Topics										
Q										
August 21, 2023										
Total   Planned   In Progress   Completed   Overdue   Not Completed   Invalid Schedule   Score   Passed   Failed										
User: Jonathan Nolan Clear All										
Agent										
Jonathan Nolan										



Development Role: Attendee ✕ Clear All

Development Type

Name

Facilitator

### Assign Module to [User]

1

Select Module

2

Schedule

3

Confirm

Search Module Name / Description

Not Yet Assigned

Status

Planned

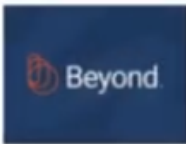
In Progress

Completed

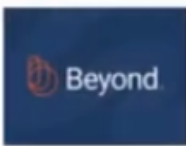
Not Yet Assigned

Invalid Schedule

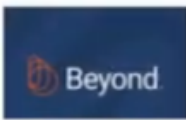
Overdue



Beyond: Bes  
In this soft skills  
Service Represent  
30m



Beyond: Intr  
Genesys Cloud  
communication, c  
15m



Beyond: Introduction to Genesys Cloud CX for Agents...  
Genesys Cloud CX is an easy and intuitive suite of cloud services for  
communication, collaboration, and customer experience management...

Not Yet Assigned

Assign

Not Yet Assigned

Assign

Not Yet Assigned

Assign

1 - 10 of 10

25 per page

Page 1 of 1

# Assign Module to Jonathan Nolan

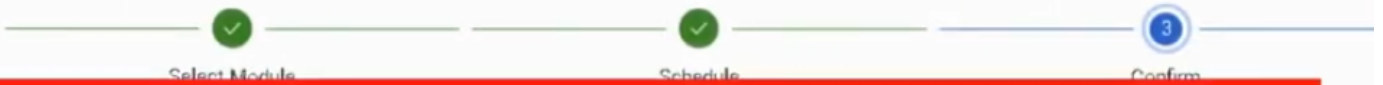
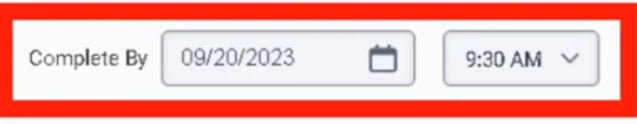


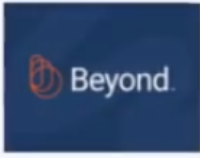

Choose date and time

Use Schedule

**i** Agent must be associated to a Business Unit to use Workforce Management

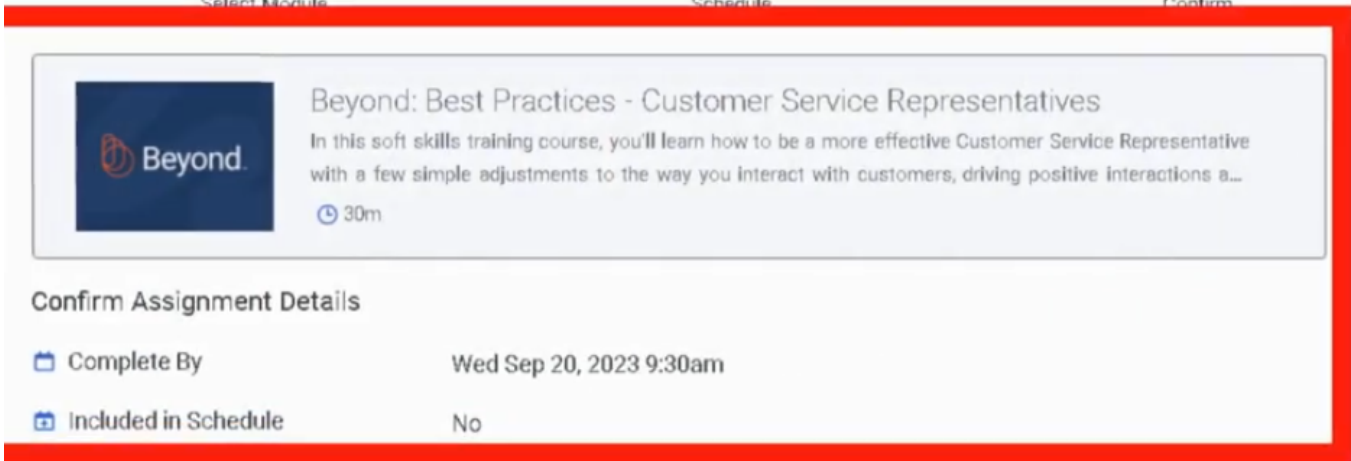
Complete By 09/20/2023  9:30 AM 



 **Beyond: Best Practices - Customer Service Representatives**  
In this soft skills training course, you'll learn how to be a more effective Customer Service Representative with a few simple adjustments to the way you interact with customers, driving positive interactions a...  
 30m

## Confirm Assignment Details

-  Complete By Wed Sep 20, 2023 9:30am
-  Included in Schedule No



Revision #1

Created 9 March 2026 19:08:27 by Cesar Gzz

Updated 13 March 2026 00:20:17 by Cesar Gzz